

RESULTS 结论:

WFSGI Pulse Survey- Covid-19 Impact on Sporting Goods Industry & Key Market Trends

WFSGI反馈调研：疫情对体育用品行业的影响及重要市场趋势

July 2020 2020年7月



PRELIMINARY INFORMATION

初步资料



- WFSGI is conducting a confidential monthly pulse survey of sporting goods companies to obtain general information related to COVID-19's impact on their business and the steps they are taking to mitigate this. In return, the industry will get access to a monthly anonymous report with the consolidated results of this industry exercise.
- WFSGI正每月对体育用品公司进行一次匿名的反馈调查，以获取与疫情对其业务的影响相关的基础信息，以及他们正在采取的应对措施。作为回报，我们将为行业出具一份月度匿名报告，其中包含行业活动的综合结果。

PRELIMINARY INFORMATION

初步资料



- The reports will aim to: Uncover the true global impact of COVID-19 on the Industry, provide key insights on the actions of Industry leaders to manage the crisis, and track the key trends of the Sporting Goods Industry as the world progresses through the COVID-19 lockdown and the easing of restrictions into the ‘new normal’. The survey is intentionally divided into specific questions for manufacturers and for brands/retailers to ensure that we are able to track trends throughout the supply chain.
- 这些报告的目的是：揭露疫情对行业的真正全球影响；提供行业领导者应对危机举措的关键见解；随着全球应对疫情采取的封锁、放宽限制到进入“新常态”，梳理体育用品行业的关键趋势。调研特别设计了针对制造商和品牌/零售商的具体问题，以确保我们能够追踪整个供应链的趋势。



1. SPORTING GOODS MANUFACTURING COMPANIES

体育用品制造企业



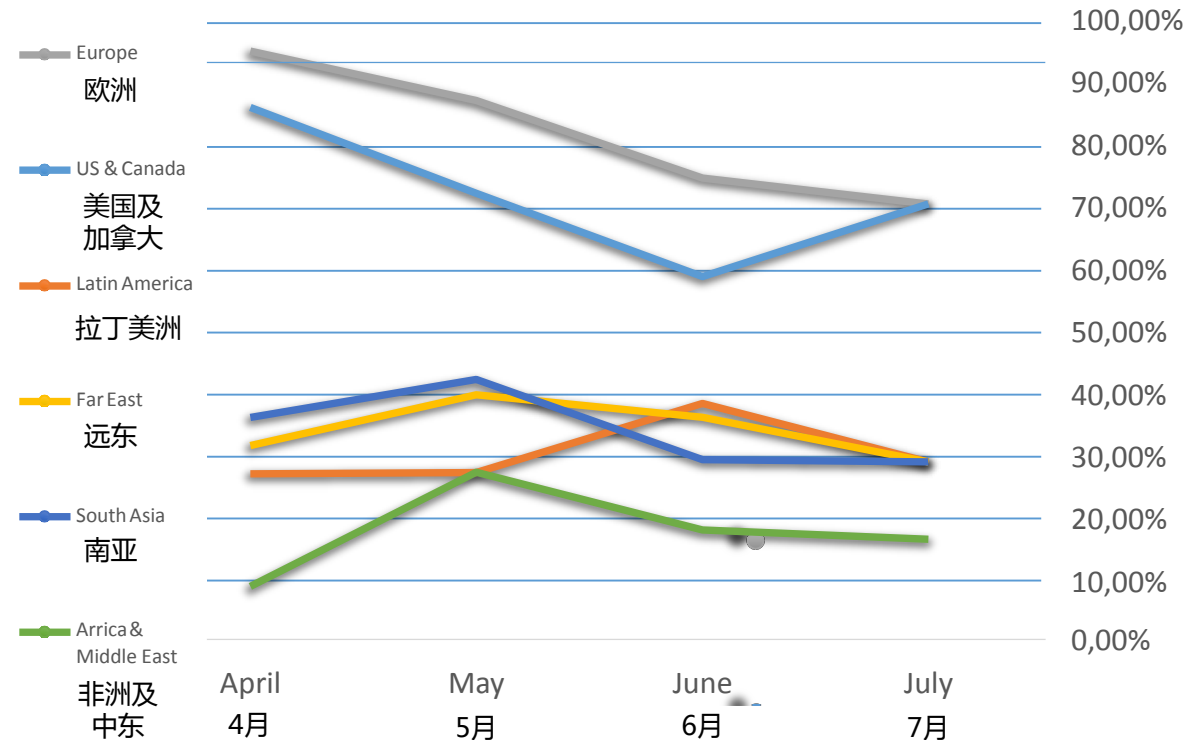
DEMAND: MINOR CHANGES

需求：细微变化



- The situation around orders from Europe, Africa & Middle East, Far East has slightly improved.
- 欧洲、非洲和中东、远东地区的订单情况略有改善。
- 10% more respondents than last month face orders decrease from Northern America.
- 与上个月相比，表示北美地区订单量减少的受访者增加了10%。
- 25% don't face any decreasing orders at all.
- 25%的受访者没有订单减少的困扰。

因订单减少受损的区域是 Where have you seen decreasing orders from:



LOGISTICS: STRONG DECREASE OF MATERIAL SHORTAGE

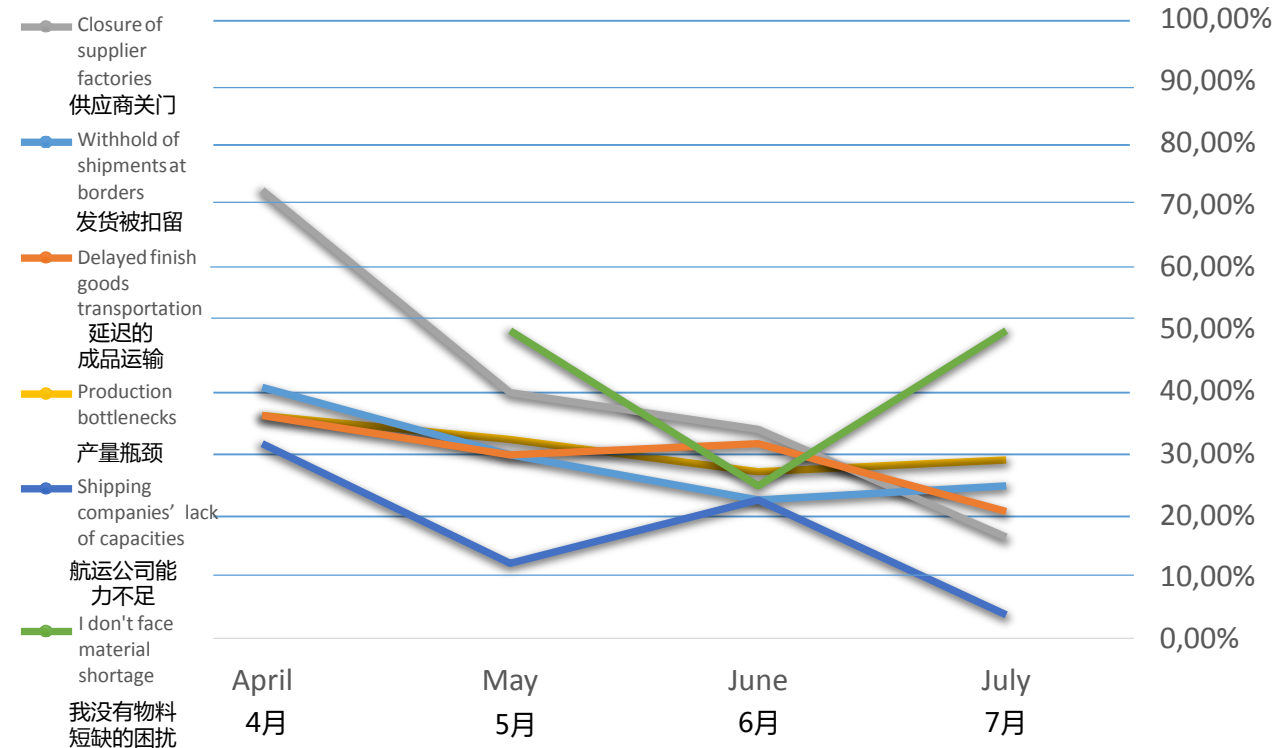
物流：材料短缺现象大幅减少



- Only 50% of respondents face material shortage, that's a considerable improvement.
- 只有50%的受访者面临物资短缺，这是一个相当大的改善。
- Production bottle necks and withhold of shipments are remaining equally challenging as last month.
- 生产瓶颈和发货被扣留的问题与上个月的情况相似。
- The trend shows that the lack of shipping capacities, delayed finished goods transportation and closure of factories are again less of an issue.
- 这一趋势表明，运输能力不足、成品运输的延迟和工厂关闭等问题再次变得不那么重要。

物料短缺的原因是

Are you facing material shortage due to:



SUPPLY: SUPPLY CHAIN LESS DISRUPTED

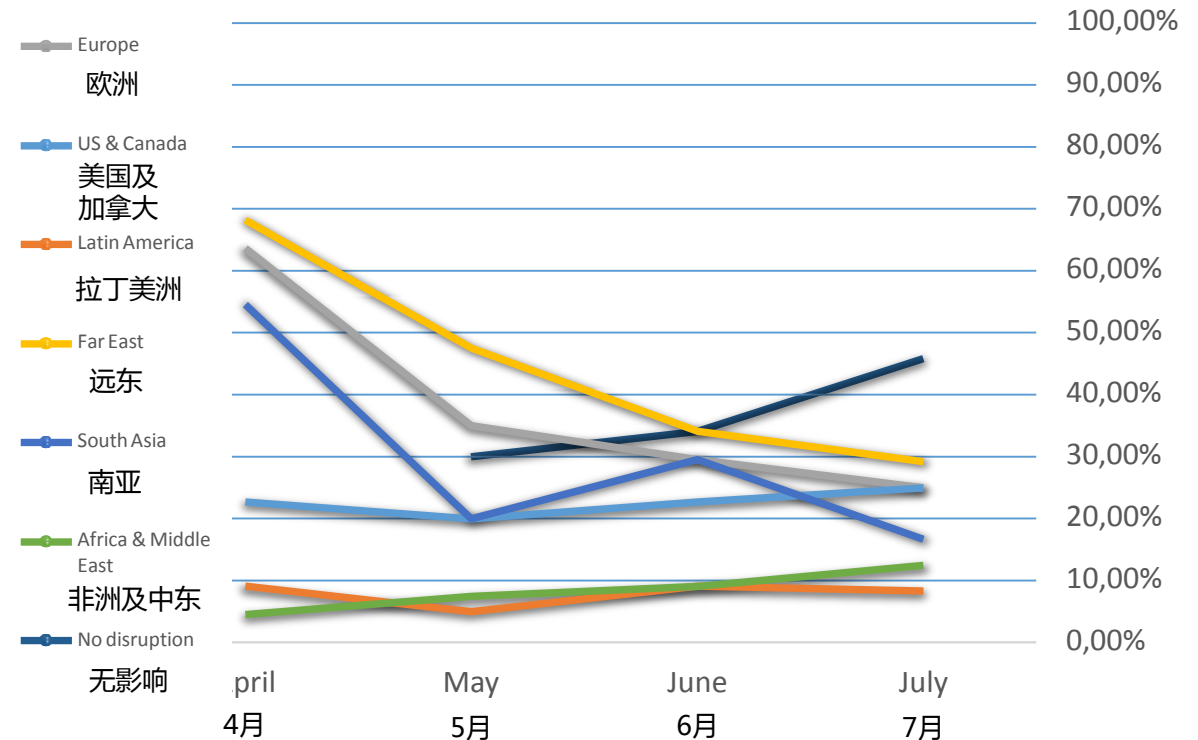
供应：供应链中断的问题有所好转



- The number of respondents facing disruption has dropped by 10%.
面临中断的受访者人数降低了10%。
- There is a positive trend for Europe, South Asia, Far East and Latin America where a decreasing number of respondent face disruption.
在欧洲、南亚、远东和拉丁美洲，呈现出一个积极的趋势，在这些地区，表示面临中断的受访者人数持续减少。
- In Northern America and Africa & Middle East more respondents face disruption than last month.
在北美洲、非洲和中东，面临中断的受访者比上个月更多。

受供应链中断影响的区域是

In which regions do you see your supply chain disrupted:



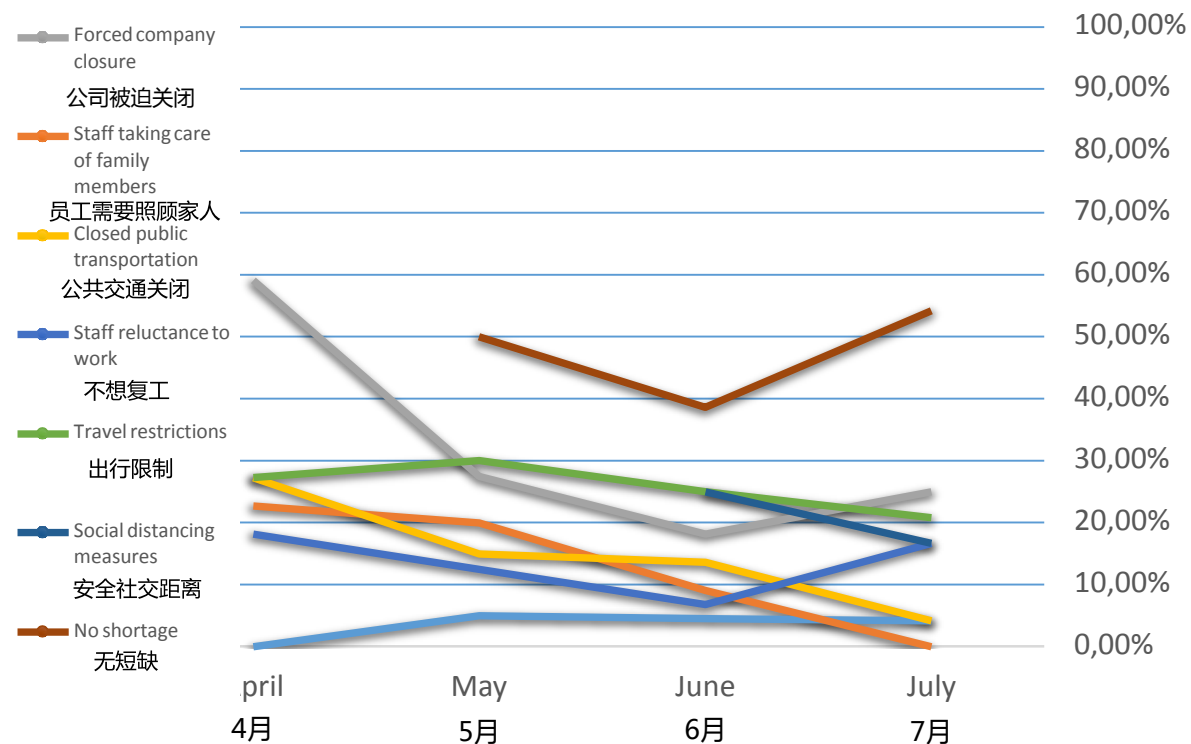
LABOR: DECREASING SHORTAGE OF LABOR

劳工：劳动力短缺问题有所缓解



- More than half of the respondents don't face labor shortage, that's an improvement of over 15% compared to last month.
- 超过一半的受访者认为没有劳动力短缺的困扰，该数字较上个月提高了15%以上。
- The number of respondents challenged by social distancing measures, travel and public transport restrictions and staff taking care of family members is continuously decreasing.
- 由于安全社交距离措施、出行和公共交通的限制，以及必须照顾家庭成员而受到困扰的受访者人数在不断减少。
- The number of respondents having staff being infected by Covid-19 remains stable.
- 表示员工感染新冠病毒的受访者人数保持稳定。
- Forced company closures and staff being reluctant to work are the only two reasons for labor shortage gaining again importance.
- 被迫关闭公司和员工不愿复工是劳动力短缺再次受到关注的两个原因。

劳工短缺的原因是 Are you confronted with shortage of labors due to:

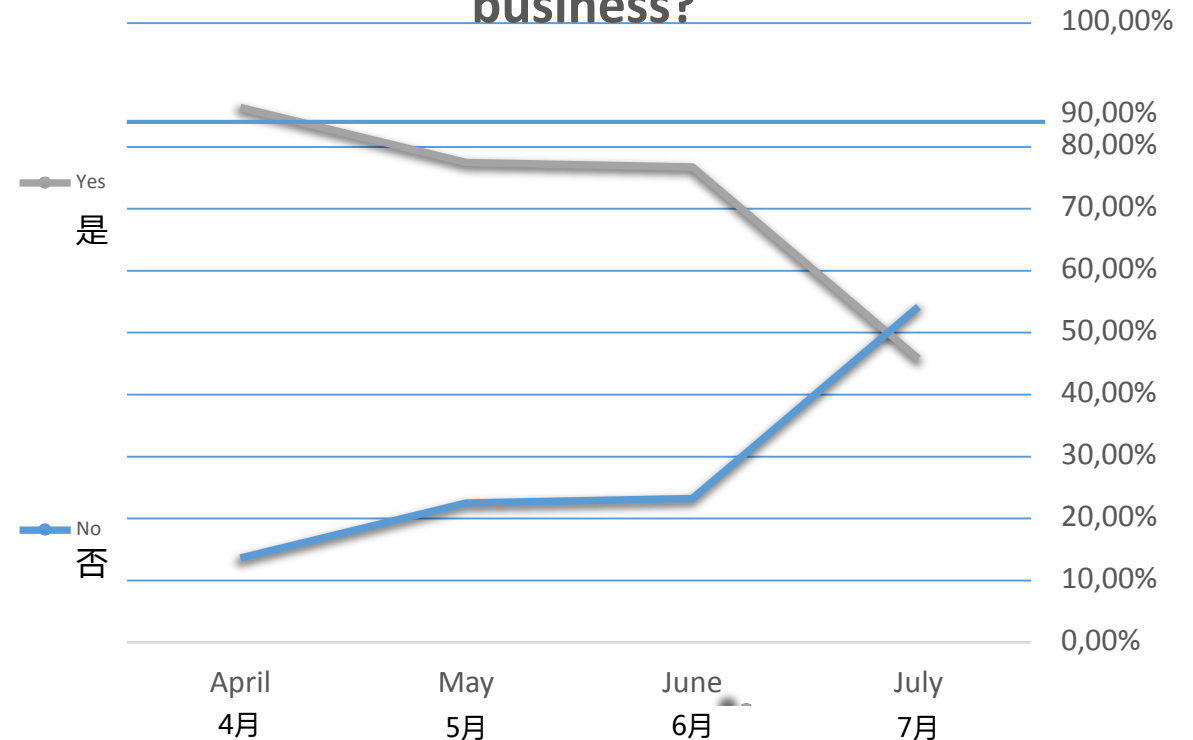


LEGAL: COVID-19 REGULATORY MEASURES SIGNIFICANTLY LESS AFFECTING 法规：疫情相关监管措施的影响明显降低



- July is the first month where more respondents of this survey are not impacted by regulatory requirement specifically put in force due to the pandemic.
- 有更多的受访者表示没有受到因疫情爆发而特别实施的监管要求的影响，这种结果在此次系列调研中第一次出现。

当地政府的疫情监管要求对您的业务有影响吗？
Do Covid-19 regulatory requirements from local government impact your business?



FINANCE: CASH FLOW ISSUES CONTINUOUS TO DECREASED

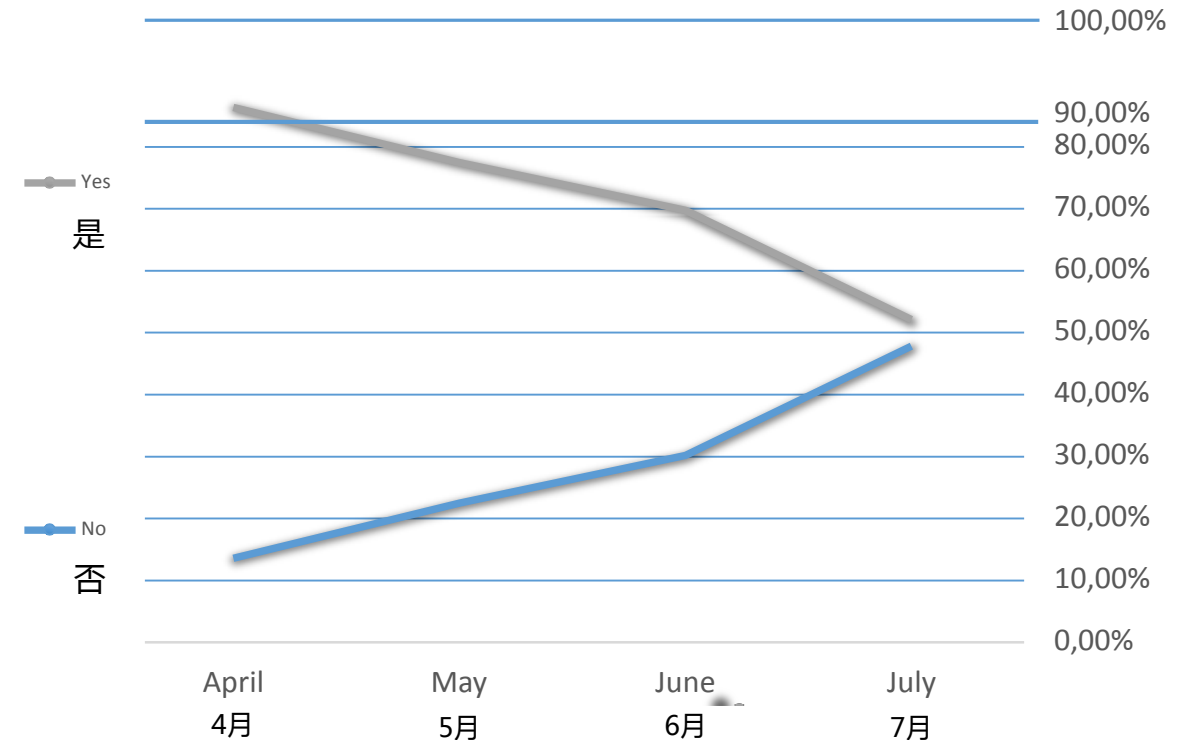
财务：现金流问题持续改善



- There is a very clear trend showing that throughout the month companies face less cash flow issues. In July 48% don't face any cash flow challenges while only 52% still have challenged.
- 有一个非常明显的趋势表明，受访公司在7月面临的现金流问题减少了。48%的受访者表示没有现金流不足的问题，仅有52%的人仍然面临挑战。

您是否面临着现金流不足的问题？

Are you facing challenges caused by low cash flow during this situation?



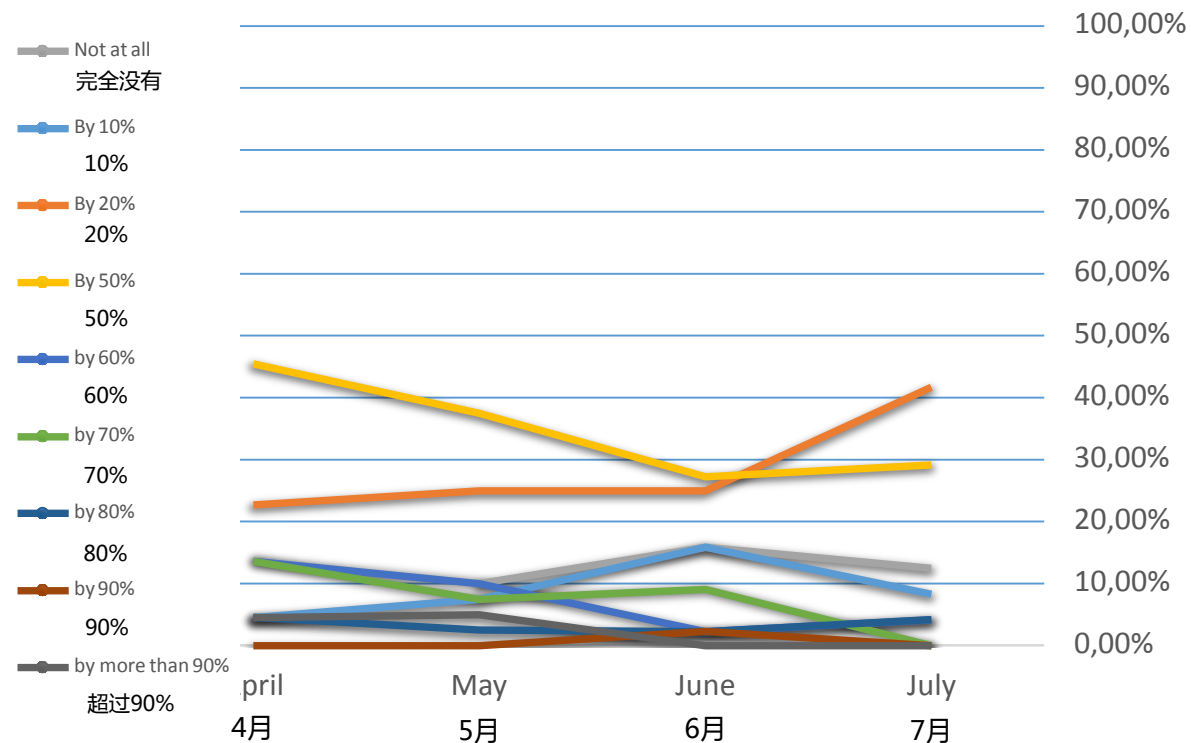
BUSINESS FORECASTING: GLOBAL SLUMP STILL PROJECTED BY MANY BUT LESS FIERCE

业务预测：仍有许多人预测全球经济衰退，但是情况没有那么“恶劣”



- COVID-19 is forecast to impact 86% of respondent's business. That's a slightly more compared to last month.
- 86%的受访者预测疫情对他们的业务产生了影响。该数字较上个月有所上升。
- There seems to be more optimism amongst respondents as only a little more than 4% expect a drop of more than 60%. Last month still 15% where expecting such a decline.
- 受访者似乎对未来形势更为乐观，仅有略高于4%的受访者预计降幅将超过60%。在上个月，该数据为15%。
- Most respondents see a business drop by 20% (42% of respondents) and a decline of 50% (30% of respondents).
- 大多数受访者预测，业务量的下降程度将达到20%和50%，受访者比例分别为42%和30%。
- The most affected regions remain Europe and Northern America where over 70% expect less business which is an increase of around 10% compared to last month.
- 受影响最严重的地区仍然是欧洲和北美，高于70%的受访者预期业务量会减少，与上个月相比该数字上升了10%左右。

您认为业务会在下月下降么？ Do you see your business dropping in the upcoming month:



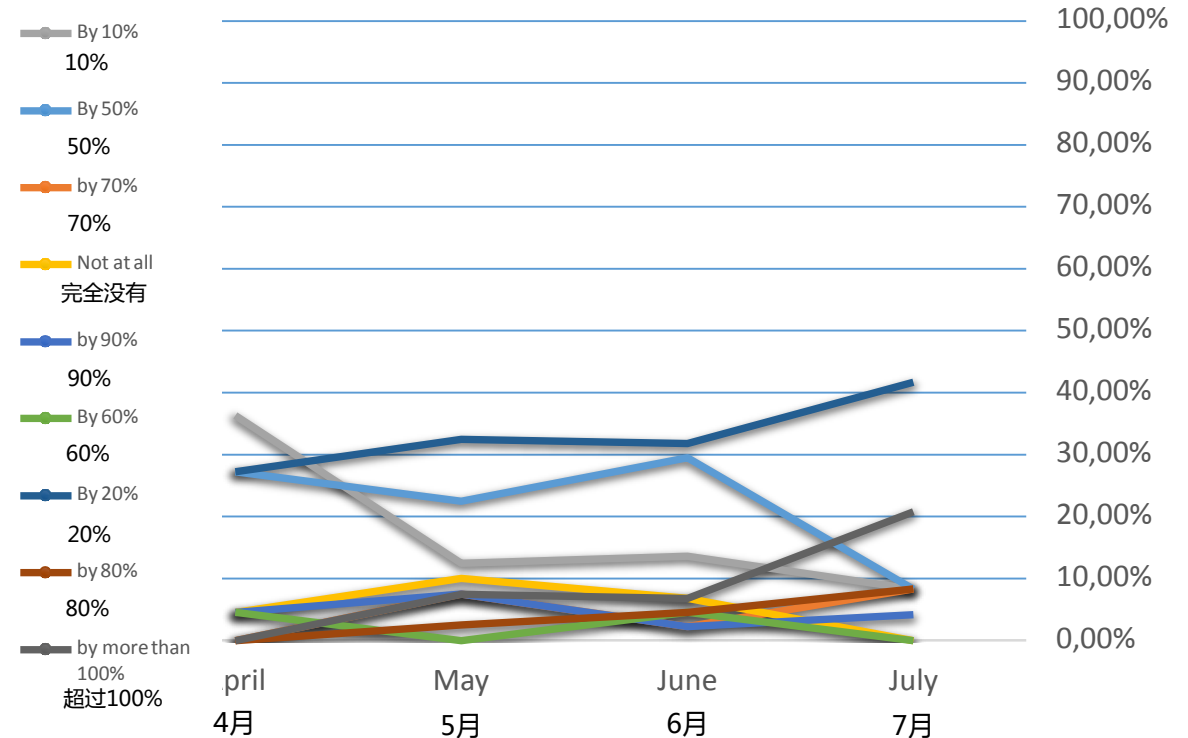
BUSINESS FORECAST: MORE OPTIMISM REGARDING FULL RECOVERY BUT LESS OPTIMISM REGARDING RECOVERY TIME



商业预测：对全面复苏持乐观态度，但恢复期或需更长

- In July it was the first time that 0% of respondents didn't expect any rebound of their business at all. Also, 20% expect a recovery of more than 100% which is nearly triple as much as in June.
- 7月份，这是第一次没有受访者认为自己的业务根本不会恢复。另外，20%的人预计恢复程度将超过100%，这几乎是6月数据的三倍。
- As in the previous months, most respondents expect a recovery of 20%.
- 与前几个月一样，大多数受访者预计业务将恢复20%。
- With regard to the time frame necessary for the recovery, respondents are slightly more pessimistic as close to 50% think that their business will need more than one year (last month only 30% opted for this answer). 37% still guess that 91-180 days are necessary for their company to rebound.
- 关于经济复苏所需的时间范围，受访者稍显悲观，近50%的受访者认为他们的业务需要一年以上的恢复期（上个月只有30%的受访者做出这个选择）。37%的受访者仍认为恢复期需要91-180天。

您认为疫情结束后，经济会复苏么？ Do you foresee the business rebound after the pandemic?



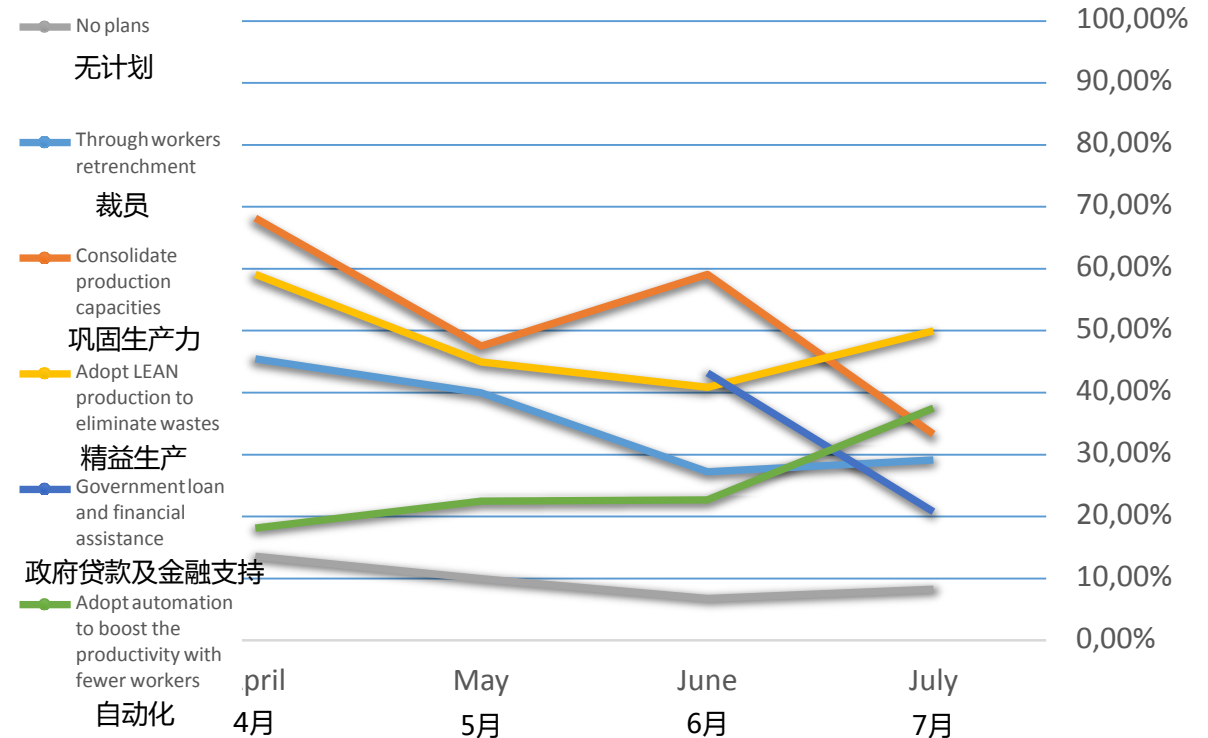
MEASURES TAKEN: SHIFT OF FOCUS FROM CONSOLIDATION TO LEAN AND AUTOMATED PRODUCTION



所采取的措施：将重点从巩固生产力转向精益和自动化生产

- The most popular options are adopting lean production and automation. The latter was only the second last option chosen in June.
- 最受欢迎的选择是采用精益生产和自动化。自动化在6月仅为倒数第二的选择。
- There is a sharp decline of companies consolidating production and benefitting from government loans.
- 巩固生产力和从政府贷款中获益的受访公司急剧减少。
- The number of respondents having no plans is stable with a little under 10%. Also, the percentage of respondents considering worker retrenchment is roughly the same.
- 没有应对方案的受访者人数保持稳定，占比略低于10%。此外，考虑裁员的受访者比例大致相同。

您计划通过什么方法维持经营？ What would be your ideas to plan to sustain your operations?





2. RESPONSES SPORTING GOOD BRANDS AND RETAILERS 体育用品品牌及零售商反馈



IMPACT MITIGATION: ONLINE SALE INCREASE REMAINS KEY

减轻影响：增加线上销售仍是关键



- Increasing online sales (76%) remains unchanged the most chosen option to mitigate the impact of the pandemic.
- 增加在线销售（76%）仍是受访者减轻疫情影响的最佳选择。
- Focusing on the recovering Asian market remain as important as last month.
- 专注于复苏中的亚洲市场的重要程度仍然与上个月一致。
- All other strategies continue to lose importance to the respondents.
- 其他的应对策略对受访者来说都越来越不重要。

您会采取什么策略来减轻市场关闭带来的巨大影响？

What would your strategy be to mitigate the sharp impact from the market shut down?



REPERCUSSION: CONTINUOUS IMPORTANCE OF SUPPLY CHAIN CONSOLIDATION

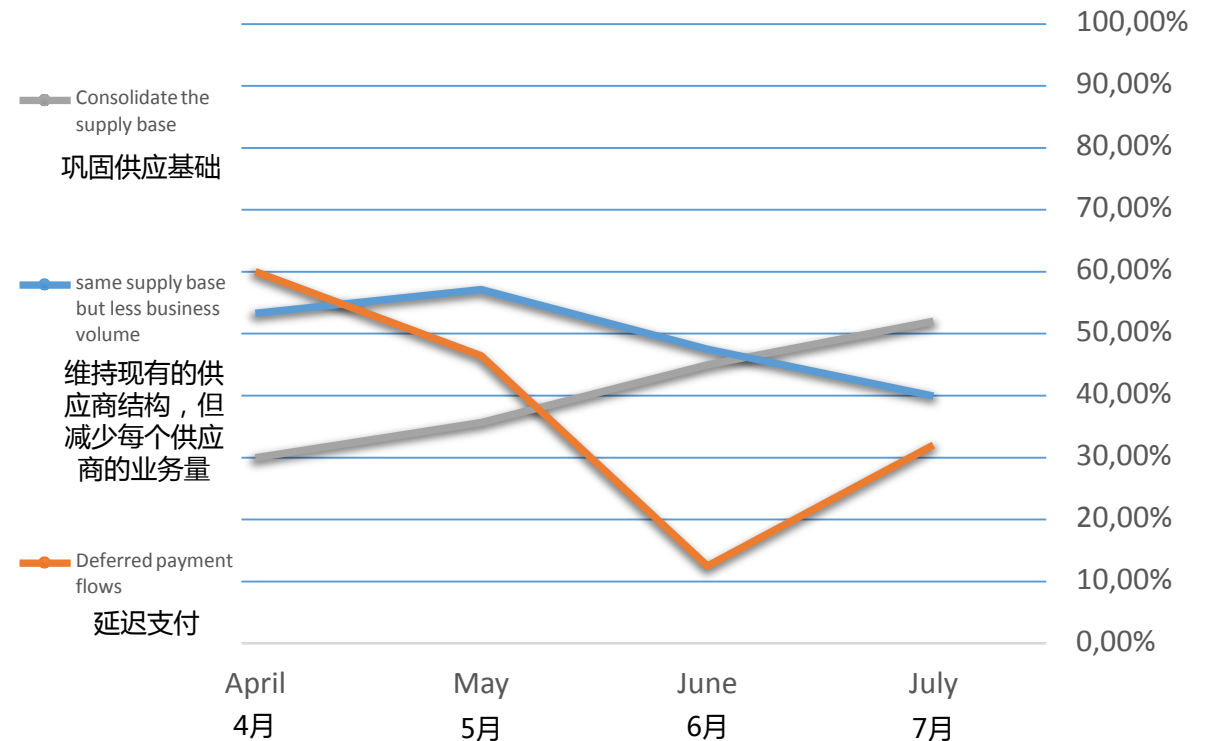
后果：供应链整合仍然重要



- The trend clearly shows that consolidating the supply chain is constantly gaining in importance over the past months. It is even the most important measure chosen in July.
- 这一趋势清楚地表明，在过去的几个月里，整合供应链的重要性不断提升。这甚至是7月结果中最受欢迎的选项。
- But also deferred payments is making a sharp increase and is again of relevance to over 30% of respondents.
- 选择延期付款的人数也在急剧增加，受访者占比再次超过30%。
- Opting to keep the same supply base but decreasing business volume is continuing to be less important.
- 选择维持相同的供应基础，但减少业务量的人数依然不多。

缓解策略对供应商有何影响？

What would be the repercussion of the mitigation strategies to the suppliers?



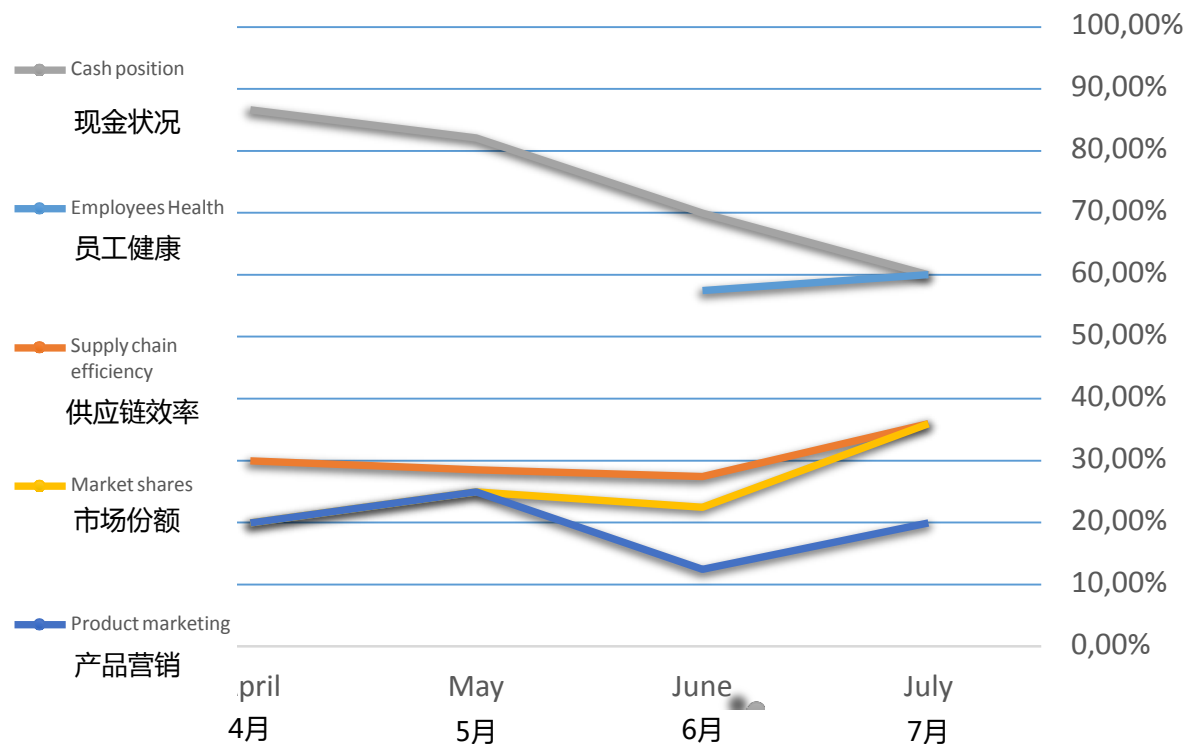
PRIORITIES: CASH POSITION AND STAFF'S HEALTH

侧重点：现金状况及员工健康



- The order of priorities remains unchanged compared to the last months.
- 与过去几个月相比，优先次序保持不变。
- However, the trend seems to announce that the order will change in the upcoming months:
- 然而，从趋势上看，优先次序将在未来几个月发生改变：
 - Cash position is further losing importance while employees' health is slightly more important than last month.
 - 现金状况的重要性进一步下降，而员工的健康状况比上个月稍显重要。
 - Supply chain efficiency, market shares and product marketing are all prioritized by around 10% more respondents as last month.
 - 关注供应链效率、市场份额和产品营销的受访者占比都较上个月上升了约10%。

在这个困难时期，您的侧重点是？
What would your priorities be during this difficult period?



EXPECTATIONS TO SUPPLIERS: FLEXIBILITY REMAINS CRUCIAL

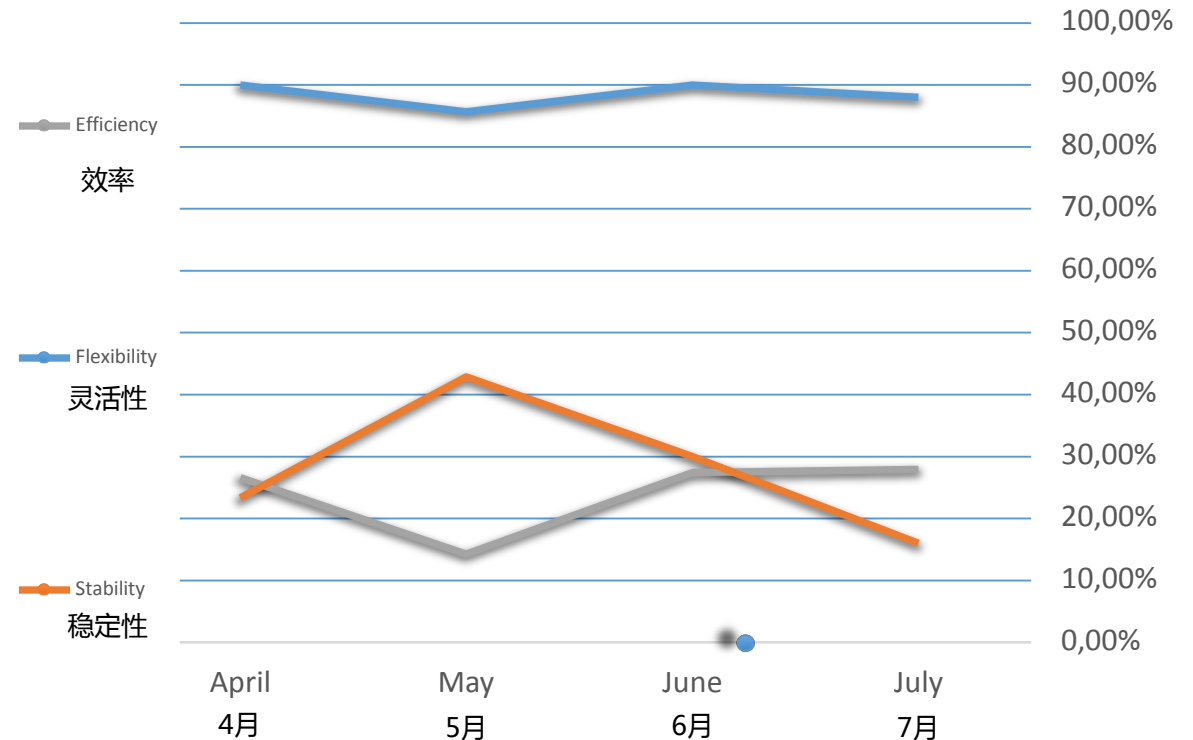
对供应商的期望：灵活性依然重要



- Flexibility remains key as it is chosen by close to 90% of respondents.
- 灵活性仍然是关键，有接近90%的受访者选择了该选项。
- Efficiency becomes more important than Stability this month as close to 30% have opted for efficient suppliers compared to 16% for Stability.
- 本月，效率变得比稳定性更重要，近30%的受访者选择了高效供应商，相比之下，仅16%的人选择了稳定的供应商。

在这个困难时期，您对供应商的期望是？

What would be your expectations to suppliers during this difficult period?



SUPPLY CHAIN TRANSFORMATION: HIGH SUPPORT FOR INNOVATIVE AND DISRUPTIVE SOLUTIONS

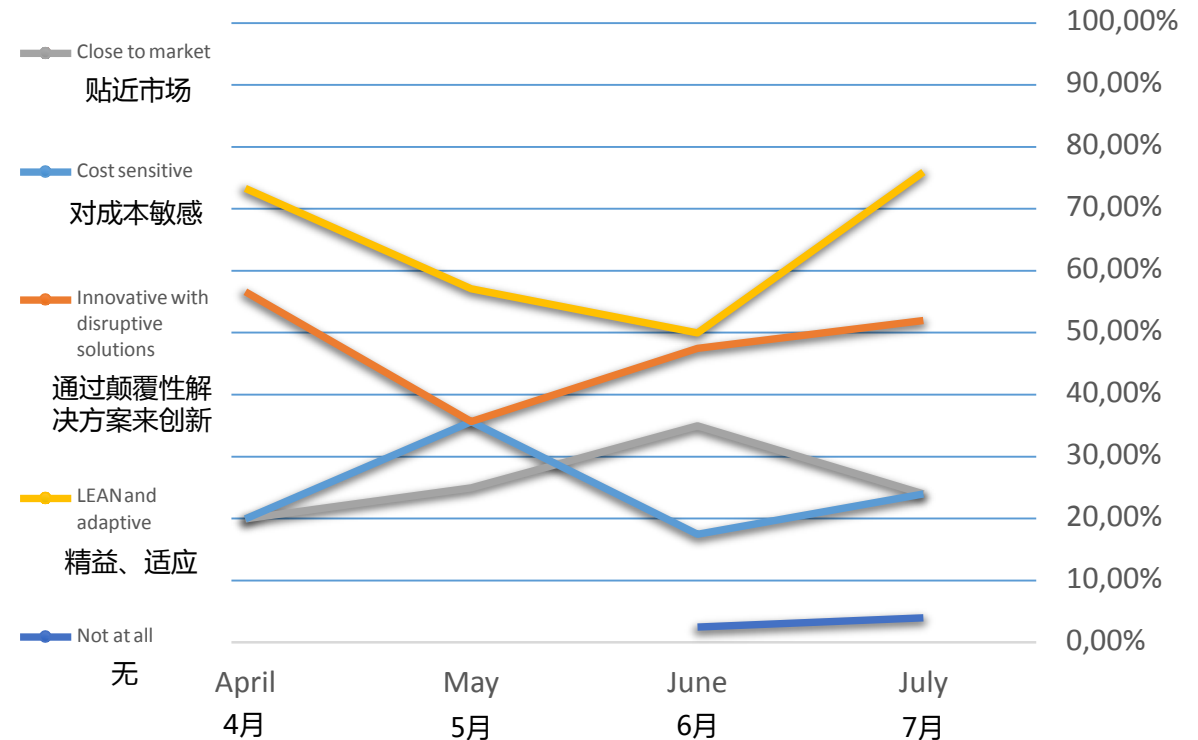


供应链转型：对创新和颠覆性解决方案的高度支持

- Lean and adaptive supply chain transformation is gaining attractiveness amongst respondents with nearly 30% more respondents opting for this solution.
- 精益和适应性供应链转型越来越受到受访者的关注，本月数据较上个月增长了近30%。
- Innovation and disruptive solutions is again slightly more important to the industry. The same applies to cost sensitivity.
- 创新和颠覆性解决方案对行业来说仍然稍显重要。对成本敏感亦是如此。
- Moving closer to the market is for the first time suffering a loss of over 10%.
- 向市场靠拢的选项首次迎来超过10%的下跌。
- Still a minority of 4% do not foresee to change their supply chains.
- 仍有4%的人不计划改变他们的供应链结构。

疫情结束后，您希望供应链如何转型？

How would you like your supply chains be transformed after the pandemic?



SOURCING PRECEDENCE: TREND SHOWS NEED FOR CHANGE

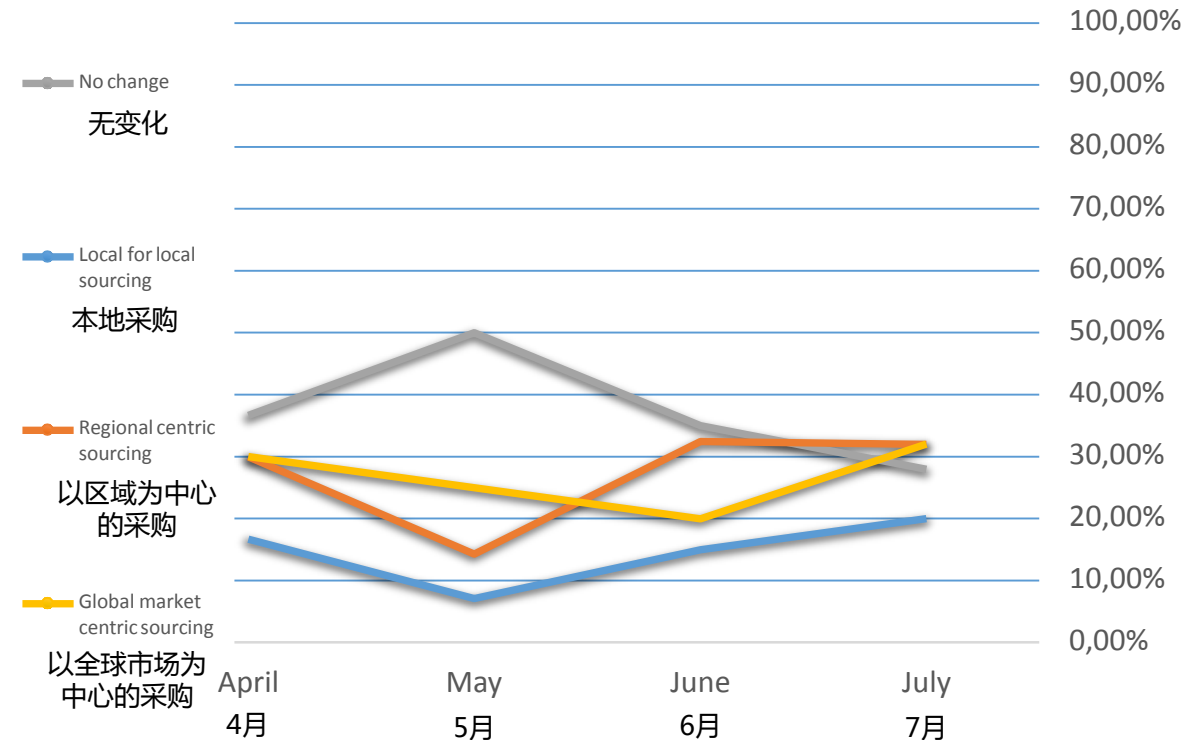
采购优先顺序：趋势表明需要变革



- There are only a little less than 30% of respondents left who are not at all changing their sourcing priorities. With that said this trend continues for the third month.
- 只有不到30%的受访者根本没有改变他们的采购优先顺序。这一下降趋势持续了三个月。
- The downwards trend for global market centric sourcing has stopped this month as there are over 10% more respondents giving this answer.
- 以全球市场为中心的采购在本月已经停止下降趋势，较上个月的结果上升了超过10%。
- The trend goes on that local to local sourcing is getting more attractive with 20% of respondents supporting this idea.
- 有20%的受访者选择了本地采购，该选项越来越有吸引力。
- Regional centric sourcing remains an option for a little over 30% of respondents.
- 以区域为中心的采购仍然是略高于30%的受访者的选择。

疫情结束后，您的采购重点是？

How do you want to reframe your sourcing priorities after the pandemic?



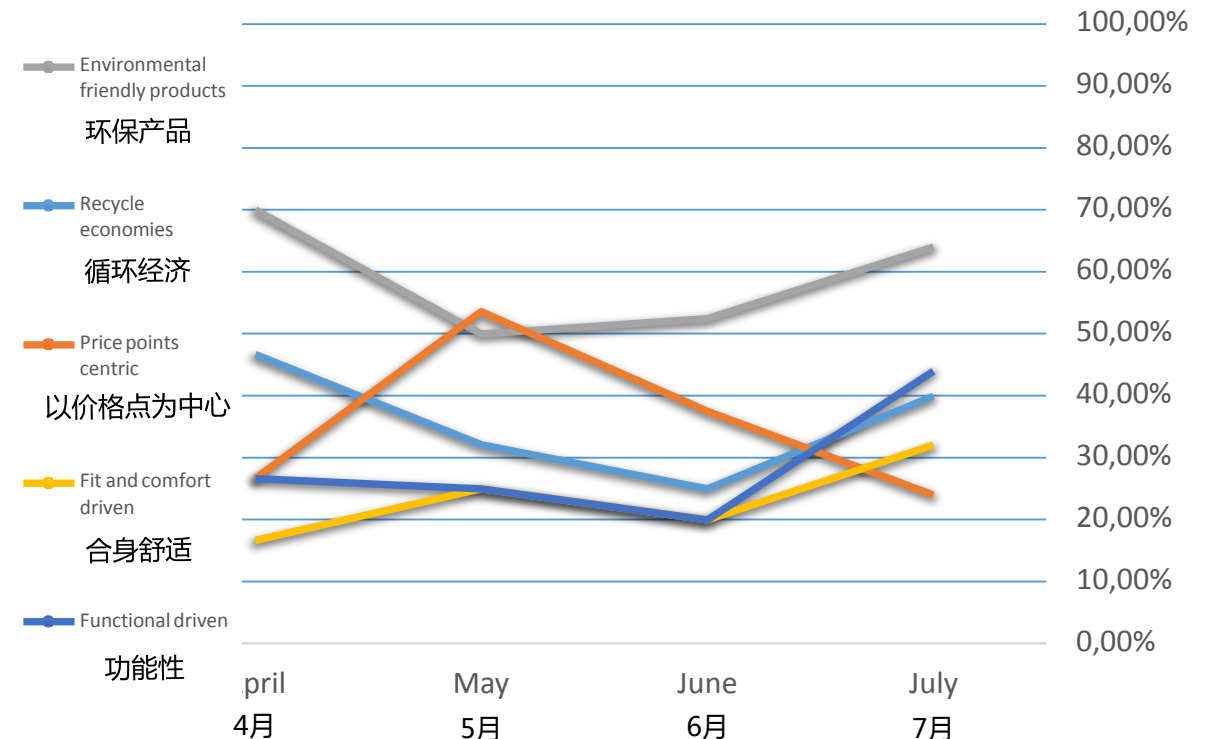
MARKET TRENDS: ENVIRONMENT AND FUNCTIONALITY PROSPER AT THE COST OF PRICE SENSITIVITY

市场趋势：牺牲了价格敏感性，环境和功能获得关注



- While price points centric trends was the most important option in May, it is now in July the least expected trend.
- 以价格点为中心的趋势在5月的结果中排名第一，而如今在7月的结果中排名最后。
- Environmentally friendly products are still topping the list.
- 环保产品仍然位居榜首。
- All other trends are gaining support of more than 10% more respondents compared to June.
- 所有其他趋势较6月数据，都获得了超过10%的增长。
- Functional driven trends are the second most important trend this month. It's noteworthy that it was the least important trend in the past months.
- 功能驱动趋势是本月第二大趋势。值得注意的是，该选项在过去几个月排名最后。

疫情结束后，新兴市场的趋势是？ What would be the emerging market trends after the pandemic?



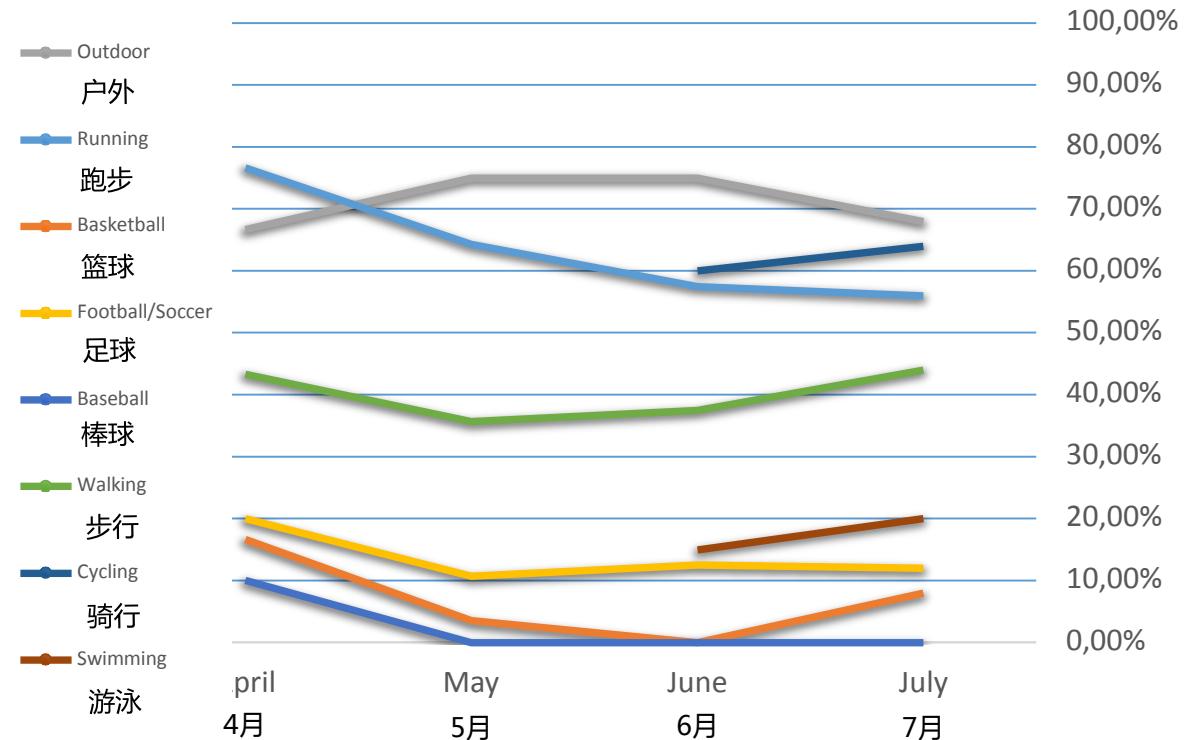
PREVAILING SPORTS AFTER THE PANDEMIC: OUTDOOR & CYCLING AHEAD OF THE REST

疫情后的流行运动：户外及骑行最受青睐



- Outdoor remains the most prevalent sport according to the industry but cycling is closing the lines.
- 户外运动仍被认为是疫后最受欢迎的运动，骑行运动紧随其后，或将赶超。
- The order remains unchanged compared to the last two months.
- 与过去两个月相比，受欢迎排序保持不变。
- It's worth noting that Basketball and Baseball was not selected by any of the respondents the third time in a row.
- 值得注意的是，篮球及棒球连续第3次未被任何受访者选择。

您认为疫情结束后，哪种运动将受到欢迎？ In your view, which product categories will prevail after the pandemic



NEXT SURVEY AUGUST 2020 下次调研 – 2020年8月



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ANYTHING WE CAN DO FOR YOU IN THESE TROUBLED TIMES?

Please contact us at any time!

在这个困难时期我们能为你做些什么？请随时与我们联系！

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KEEP SAFE & HEALTHY 保重

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